



INDIANA
WORKFORCE
DEVELOPMENT
AND ITS **WorkOne** CENTERS

Indiana's Employment and Labor Force Estimates March 2016

04/13/2016



Key Points

- Indiana total private employment lost 10,500 jobs over the month, yet remains above the prior March 2000 peak by 16,700. March 2016 Private employment stands at 2,629,300 for Indiana. US private employment grew by 195,000 over the month, a rate of (0.2%).
- **Indiana private sector employment is up 34,400 from a year ago.** This is annual growth of 1.3% which is less than the national growth rate of 2.3% over the year. Over the month Private Education & Health Services gained 2,500 jobs.

Key sectors showing job decreases in March:

- Total Nonfarm lost 9,000 jobs over the month.
- Trade, Transportation and Utilities lost 4,100 jobs, and Construction lost 2,300.
- Manufacturing declined by of 1,500 over the month. The U.S. Manufacturing also declined by 0.2%. (the latest Manufacturing ISM index = 51.8 Nationally)
- Average weekly hours for Indiana manufacturing remained at 41.3 for the second month in a row.
- Nationally in March **average hourly earnings for all employees** on private nonfarm payrolls, at \$25.47, a 2 cent decrease from February. Indiana average hourly earnings for all employees was at \$23.23 for the second month in a row after February was revised.



Key Points

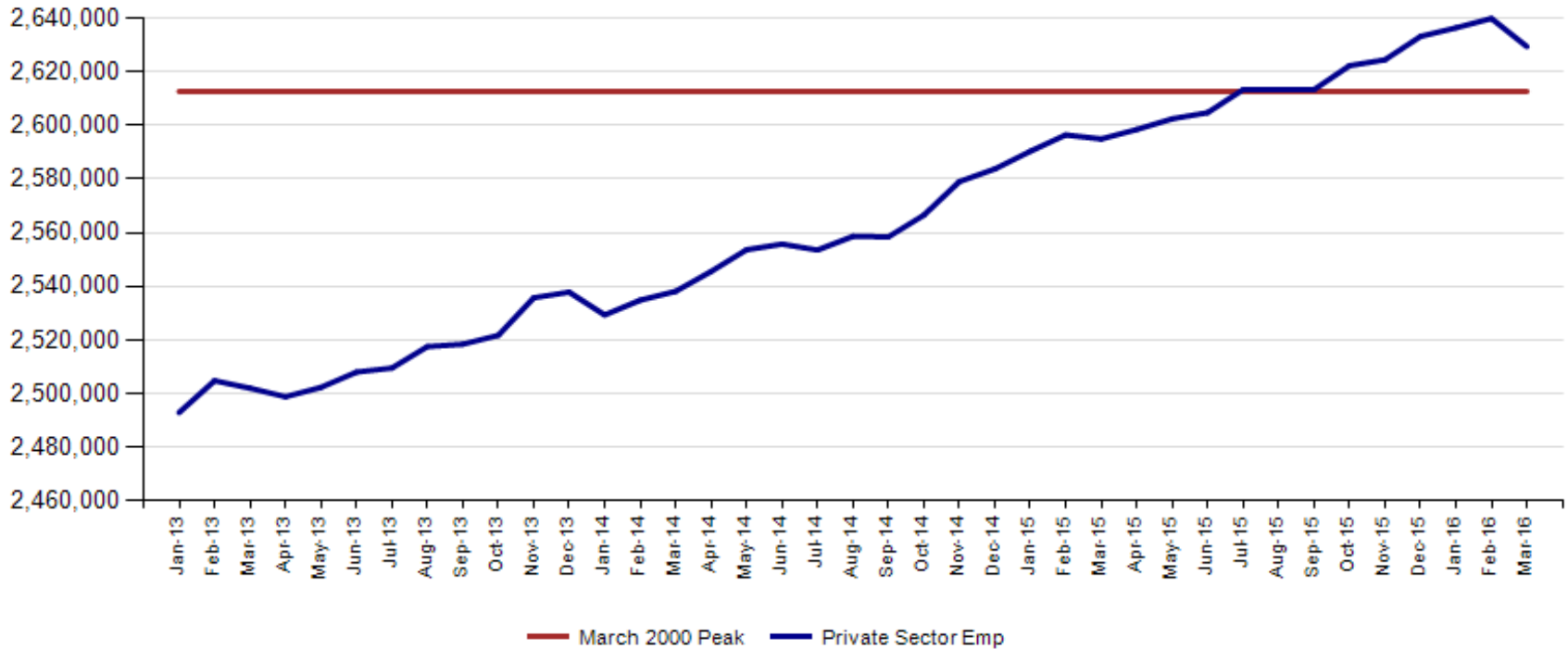
LAUS Household Survey:

- Indiana's March seasonally adjusted unemployment rate stands at 5.0%. Nationally the unemployment rate is also 5.0%.
- Indiana's labor force gained 18,070 over the month, and 9,305 in employment. Unemployment estimates rose by 8,765. Indiana's Labor Force Participation rate increased 0.3% to 64.9% in March. This remains above the US Labor Force Participation rate which stands at 63.0%.
- **Indiana's Labor Force is up 88,401 over the year, and has gained 157,055 since January 2013.** The Labor Force has grown by 60,788 since December 2015. Indiana's seasonally adjusted labor force stands at 3,340,267.
- Indiana's unemployment is up 8,765 over the month and 14,893 over the last three months. The unemployed is also up by 1,086 over the year, but since January 2013 the unemployed has declined by 100,576, which is -37.7%.
- Indiana's unemployment rate has also increased by .4 over the last three months.



After March estimates, private employment stands 16,700 above prior peak. Indiana's new private sector peak based on revised February 2016 numbers now stands at 2,639,800 .

Indiana Private Sector Employment





Indiana private sector employment lost 10,500 jobs over the month but is still up 34,400 over the year. Manufacturing lost 1,500 jobs over the month. Strongest gains over the year have been Private Education & Health Services, Trade, Transportation & Utilities, Leisure and Hospitality, and Construction. Total Nonfarm showed an over the month loss of 9,000 jobs.

IN Employment Change Over the Month, Year-to-Date and Over the Year (seasonally adjusted)

Industry	March 2015	December 2015	February 2016	March 2016	Month Change	Y-to-D Change	Y-to-Y Change
Private Educational & Health Services	448.3	459.5	462.7	465.2	2.5	5.7	16.9
.....Private Educational Services	70.1	73.2	72.4	72.3	-0.1	-0.9	2.2
.....Health Care & Social Assistance	378.2	386.3	390.3	392.9	2.6	6.6	14.7
Manufacturing	517.5	520.2	517.4	515.9	-1.5	-4.3	-1.6
Professional & Business Services	327.3	327.9	322.2	320.7	-1.5	-7.2	-6.6
Financial Activities	130.1	131.3	132.4	131.3	-1.1	0.0	1.2
Construction	125.4	131.0	132.6	130.3	-2.3	-0.7	4.9
Leisure and Hospitality	299.6	304.6	309.2	307.8	-1.4	3.2	8.2
Trade, Transportation & Utilities	579.8	592.9	595.9	591.8	-4.1	-1.1	12.0
.....Trade	441.1	447.6	452.8	450.6	-2.2	3.0	9.5
.....Transportation, Warehousing & Utilities	138.7	145.3	143.1	141.2	-1.9	-4.1	2.5
All Other	166.9	165.7	167.4	166.3	-1.1	0.6	-0.6
Total Private	2,594.9	2,633.1	2,639.8	2,629.3	-10.5	-3.8	34.4
Government (Includes Public Schools & Hospitals)	424.7	426.6	427.7	429.2	1.5	2.6	4.5
Total Nonfarm	3,019.6	3,059.7	3,067.5	3,058.5	-9.0	-1.2	38.9
United States Total Private	119,011.0	121,106.0	121,497.0	121,692.0	195.0	586.0	2,681.0



Total nonfarm is 41,300 over the March 2000 peak. Manufacturing and Construction show combined losses of 179,000 over this time frame. Private Educational and Health Services have gained 135,100 since the peak.

IN Statewide Estimates (seasonally adjusted) -- March 2016

Supersector	Private Empl. Peak March 2000	Private Empl. Trough July 2009	February 2016	March 2016	Change Since Peak	Change Since Trough	Month to Month Change
Private Educational & Health Services	330.1	411.1	462.7	465.2	135.1	54.1	2.5
.....Private Educational Services	52.2	63.3	72.4	72.3	20.1	9.0	-0.1
.....Health Care & Social Assistance	277.9	347.8	390.3	392.9	115.0	45.1	2.6
Manufacturing	671.1	427.9	517.4	515.9	-155.2	88.0	-1.5
Professional & Business Services	260.5	255.9	322.2	320.7	60.2	64.8	-1.5
Financial Activities	145.7	130.7	132.4	131.3	-14.4	0.6	-1.1
Construction	154.1	116.5	132.6	130.3	-23.8	13.8	-2.3
Leisure and Hospitality	267.2	276.8	309.2	307.8	40.6	31.0	-1.4
Trade, Transportation & Utilities	617.5	545.7	595.9	591.8	-25.7	46.1	-4.1
.....Trade	485.1	421.6	452.8	450.6	-34.5	29.0	-2.2
.....Transportation, Warehousing & Utilities	132.4	124.1	143.1	141.2	8.8	17.1	-1.9
All Other	166.4	158.6	167.4	166.3	-0.1	7.7	-1.1
Total Private	2,612.6	2,323.2	2,639.8	2,629.3	16.7	306.1	-10.5
Government (Includes Public Schools & Hospitals)	404.6	434.5	427.7	429.2	24.6	-5.3	1.5
Total Nonfarm	3,017.2	2,757.7	3,067.5	3,058.5	41.3	300.8	-9.0
United States Total Private	110,875.0	108,170.0	121,497.0	121,692.0	10,817.0	13,522.0	195.0



Indiana job growth over the year is under the National trend in private sector gains in March. Manufacturing is now below the U.S. rate over the year. Private Educational & Health Services and Trade Transportation and Utilities both are both growing faster than the US over the year.

IN Employment Change Compared to the U.S.

Industry	Indiana Month to Month	U.S. Month to Month	Indiana vs U.S. Change	Indiana Year-to-Date	U.S. Year-to-Date	Indiana vs U.S. Change	Indiana Year-to-Year	U.S. Year-to-Year	Indiana vs U.S. Change
Private Educational & Health Services	0.5%	0.2%	OVER	1.2%	0.7%	OVER	3.8%	3.3%	OVER
.....Private Educational Services	-0.1%	0.2%	UNDER	-1.2%	0.4%	UNDER	3.1%	1.9%	OVER
.....Health Care & Social Assistance	0.7%	0.2%	OVER	1.7%	0.8%	OVER	3.9%	3.5%	OVER
Manufacturing	-0.3%	-0.2%	UNDER	-0.8%	-0.2%	UNDER	-0.3%	-0.2%	UNDER
Professional & Business Services	-0.5%	0.2%	UNDER	-2.2%	0.3%	UNDER	-2.0%	3.1%	UNDER
Financial Activities	-0.8%	0.2%	UNDER	0.0%	0.5%	UNDER	0.9%	1.8%	UNDER
Construction	-1.7%	0.6%	UNDER	-0.5%	1.1%	UNDER	3.9%	4.7%	UNDER
Leisure and Hospitality	-0.5%	0.3%	UNDER	1.1%	0.8%	OVER	2.7%	3.1%	UNDER
Trade, Transportation & Utilities	-0.7%	0.2%	UNDER	-0.2%	0.6%	UNDER	2.1%	1.9%	OVER
.....Trade	-0.5%	0.2%	UNDER	0.7%	0.9%	UNDER	2.2%	2.0%	OVER
.....Transportation, Warehousing & Utils	-1.3%	0.0%	UNDER	-2.8%	-0.5%	UNDER	1.8%	1.2%	OVER
All Other	-0.7%	0.0%	UNDER	0.4%	-0.1%	OVER	-0.4%	-0.3%	UNDER
Total Private	-0.4%	0.2%	UNDER	-0.1%	0.5%	UNDER	1.3%	2.3%	UNDER
Government (Includes Public Schools & Hospitals)	0.4%	0.1%	OVER	0.6%	0.2%	OVER	1.1%	0.6%	OVER
Total Nonfarm	-0.3%	0.1%	UNDER	0.0%	0.4%	UNDER	1.3%	2.0%	UNDER

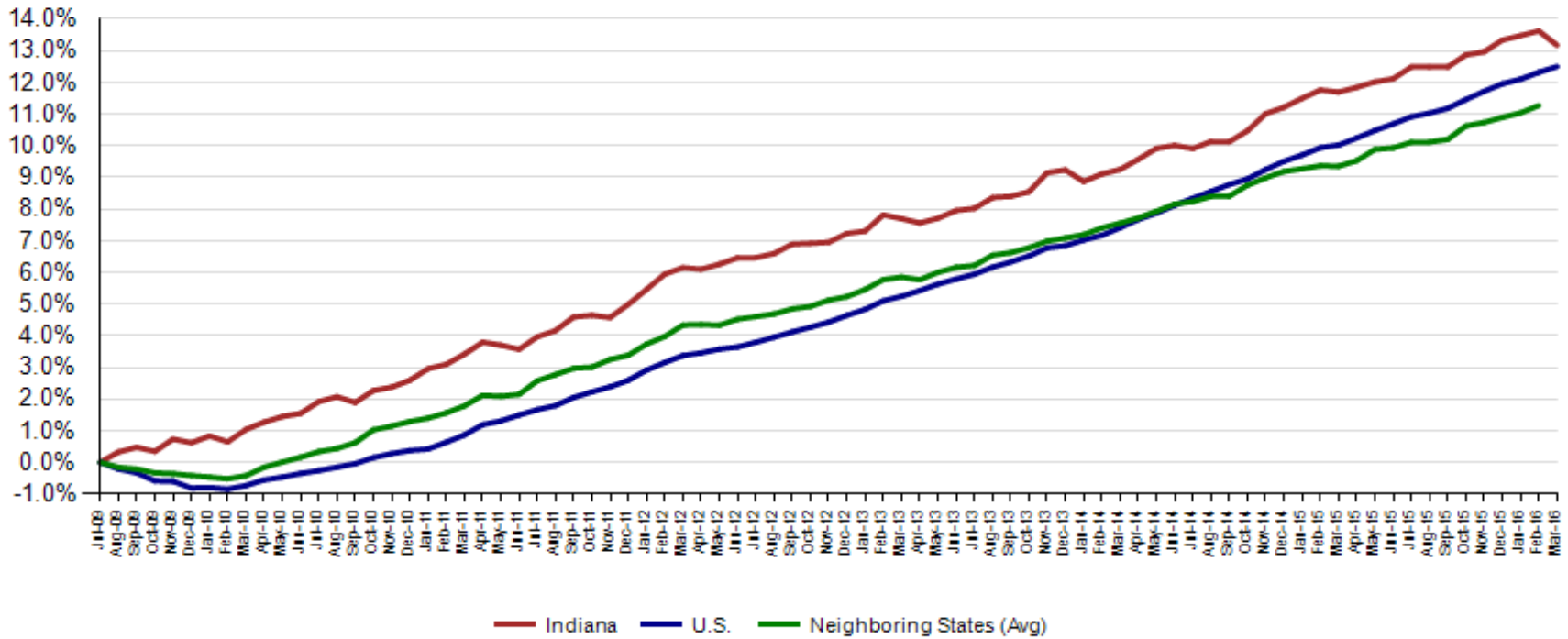


February Total Private preliminary estimates were revised downward by 3,400 and the increase from January to February is now 3,500.

Revisions to February 2016 Estimates						
INDUSTRY TITLE	Jan	Feb Prel	Feb Rev	Revision	Chg from Jan	Prel Chg from Jan
Total Nonfarm	3065.4	3072.8	3067.5	-5.3	2.1	7.4
Total Private	2636.3	2643.2	2639.8	-3.4	3.5	6.9
Goods Producing	659.3	656.9	656.3	-0.6	-3.0	-2.4
Service-Providing	2406.1	2415.9	2411.2	-4.7	5.1	9.8
Private Service Providing	1977.0	1986.3	1983.5	-2.8	6.5	9.3
Construction	132.6	132.9	132.6	-0.3	0.0	0.3
Manufacturing	520.3	517.7	517.4	-0.3	-2.9	-2.6
Trade, Transportation, and Utilities	591.0	596.0	595.9	-0.1	4.9	5.0
Wholesale Trade	117.5	119.0	118.9	-0.1	1.4	1.5
Retail Trade	328.7	334.1	333.9	-0.2	5.2	5.4
Transportation, Warehousing, and Utilities	144.8	142.9	143.1	0.2	-1.7	-1.9
Information	32.6	32.4	32.4	0.0	-0.2	-0.2
Financial Activities	132.9	132.5	132.4	-0.1	-0.5	-0.4
Finance and Insurance	96.8	96.7	96.4	-0.3	-0.4	-0.1
Real Estate and Rental and Leasing	36.1	35.8	36.0	0.2	-0.1	-0.3
Professional and Business Services	326.3	323.3	322.2	-1.1	-4.1	-3.0
Admin & Support & Waste Mgmt & Remediation Services	182.1	180.9	179.8	-1.1	-2.3	-1.2
Education and Health Services	458.9	463.4	462.7	-0.7	3.8	4.5
Leisure and Hospitality	308.5	309.8	309.2	-0.6	0.7	1.3
Other Services	126.8	128.9	128.7	-0.2	1.9	2.1
Government	429.1	429.6	427.7	-1.9	-1.4	80.5

Since the low point of employment (July 2009), private sector employment growth in Indiana has surpassed the U.S. (13.2% vs. 12.5%).

Private Sector Job Growth Since the Low Point of Employment in Indiana

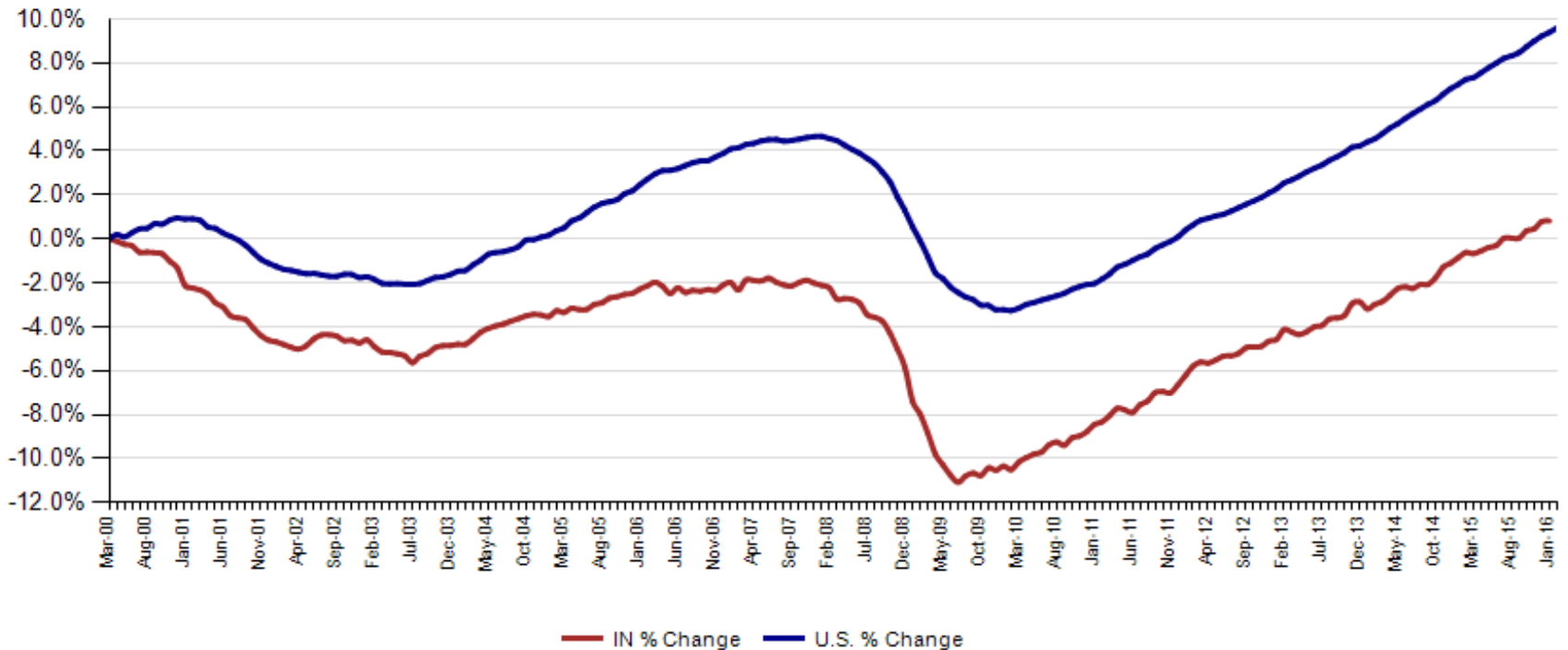


Source: Current Employment Statistics, seasonally adjusted



Since Indiana's high point of employment (March 2000), private sector employment growth in Indiana has lagged the U.S. (0.6% growth vs. 9.8% nationally).

Private Sector Job Growth Since the Peak of Employment in Indiana

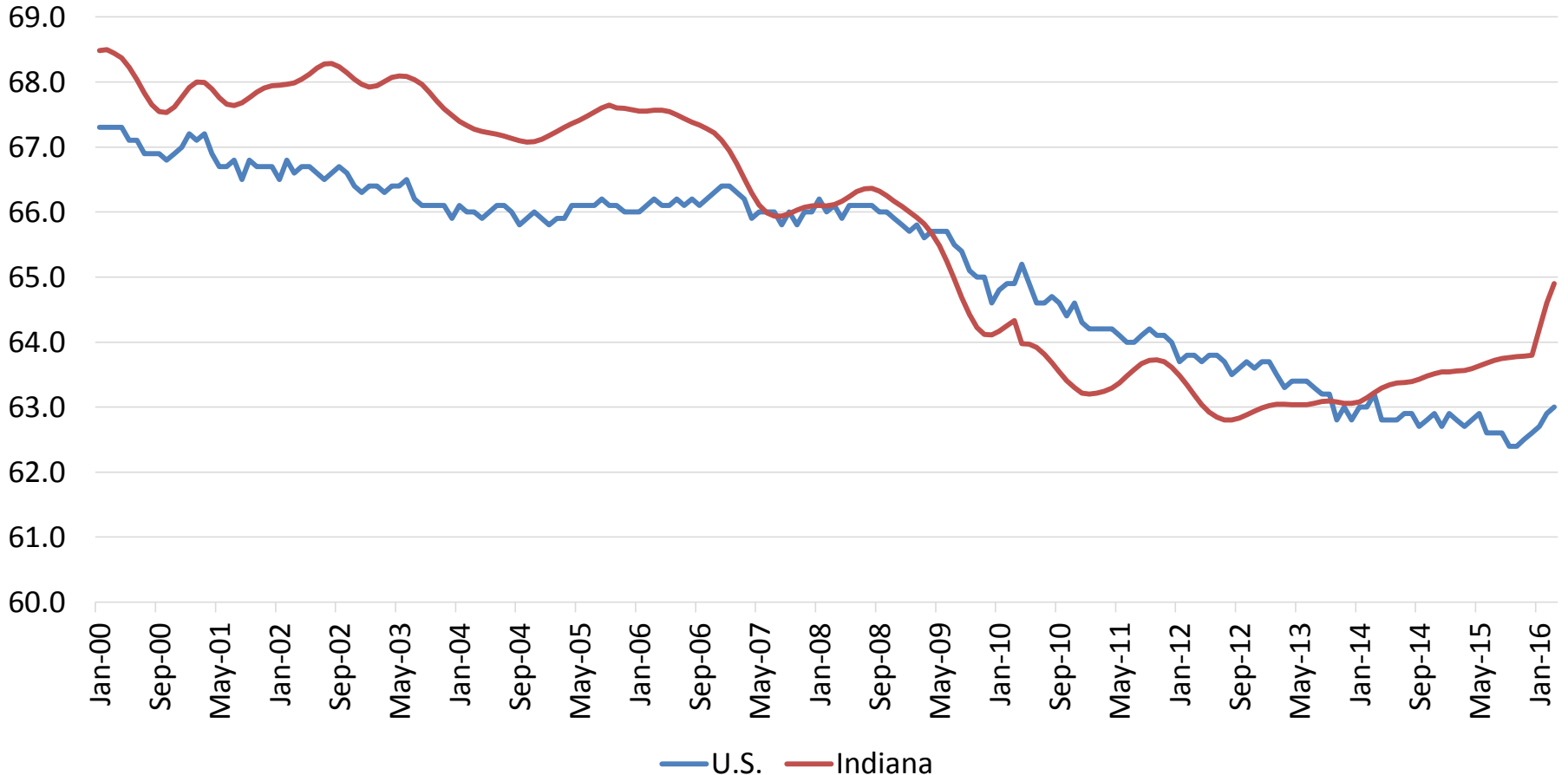


Source: Current Employment Statistics, seasonally adjusted



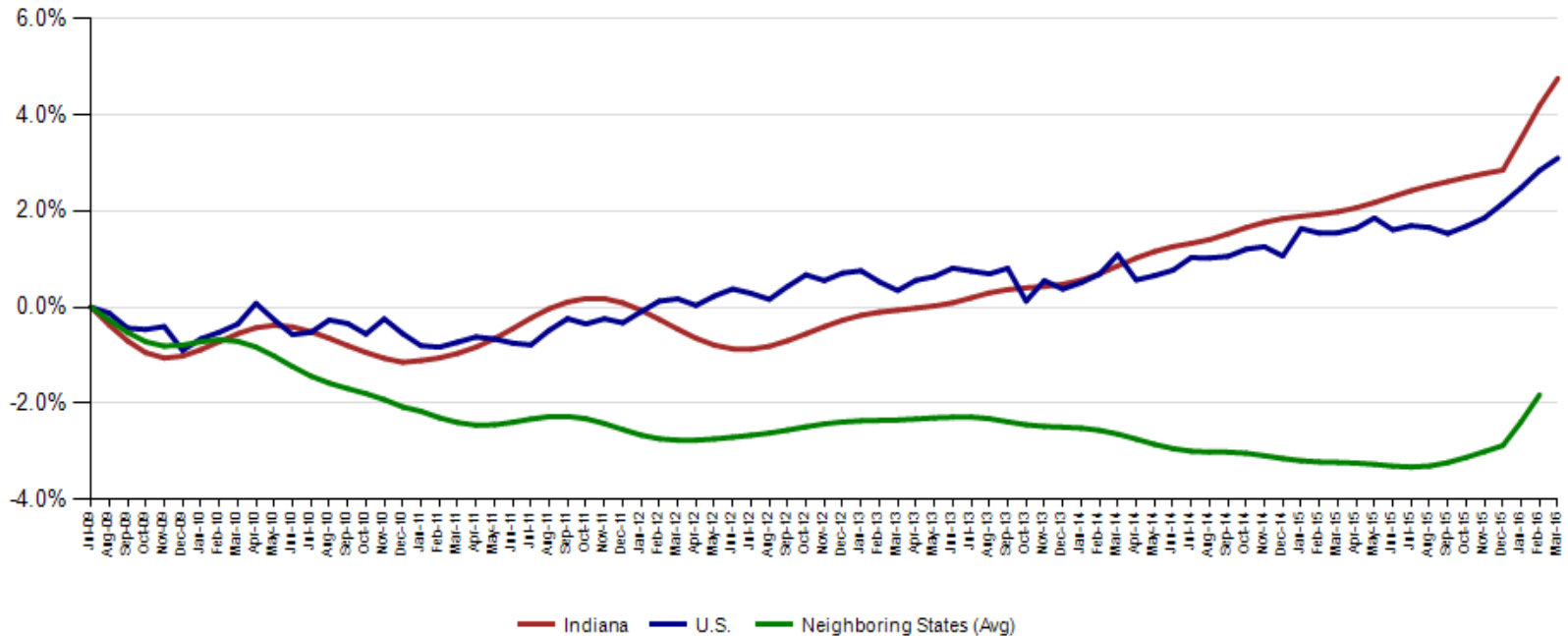
Indiana's Labor Force gained 18,070 over the month, 88,401 over the year, and 157,055 since January 2013. Indiana's labor force stands at 3,340,267. The Indiana labor force participation rate is at 64.9% for March compared to the U.S. rate of 63%. This is the highest it has been since July 2009.

Labor Force Participation Rate



The rise in the Labor Force Participation is showing up nationally and regionally among our neighboring border states

Labor Force Change Since July 2009 Indiana Trough (seasonally adjusted)



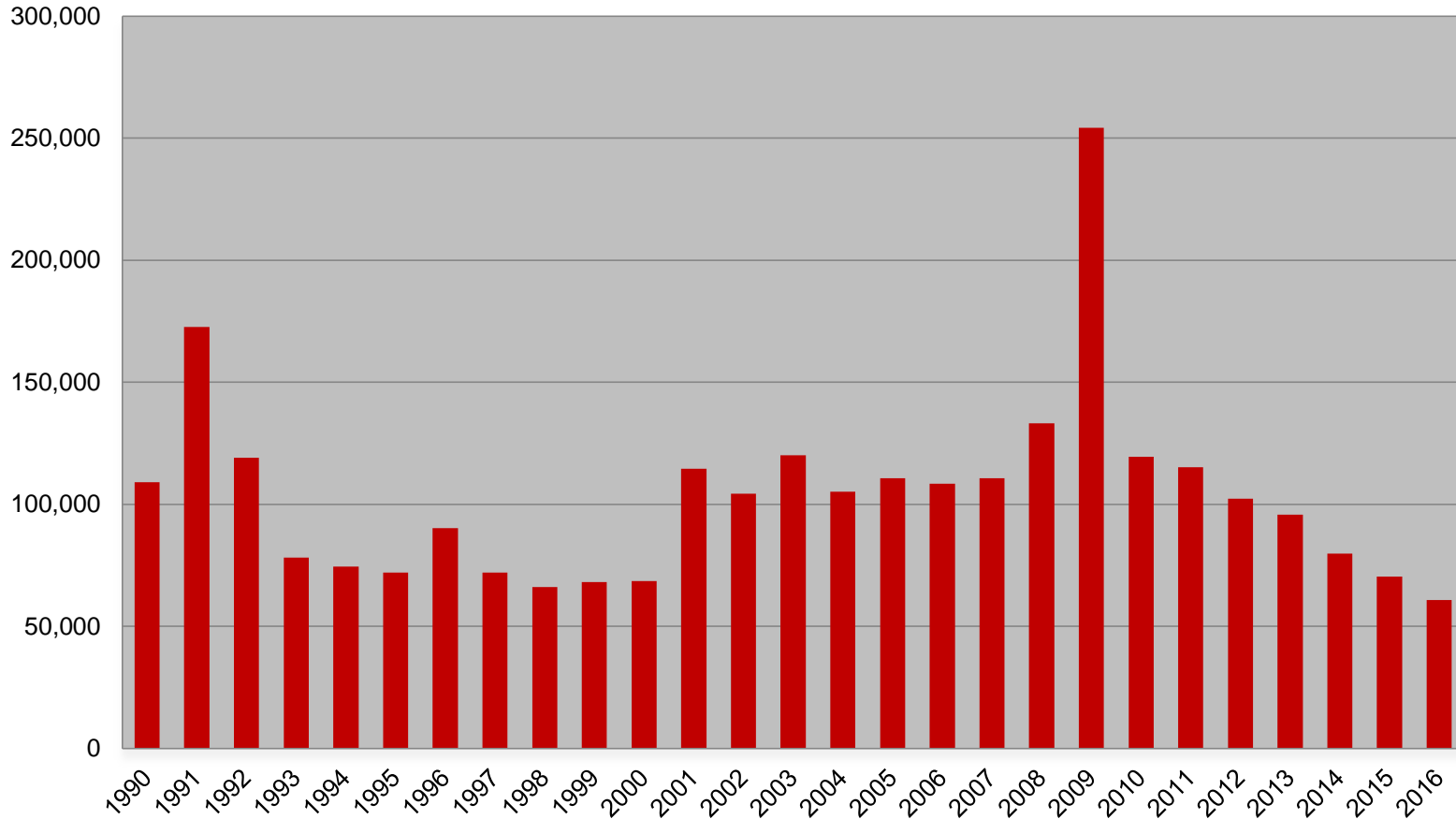


Midwest Comparison Rates: Seasonally
Adjusted Over the Year and Over the Month
(confidential and preliminary)

	March 2015	February 2016	March 2016	Monthly change	Yearly change
Indiana	5.1%	4.7%	5.0%	0.3%	-0.1%
U.S.	5.5%	4.9%	5.0%	0.1%	-0.5%
Illinois	5.9%	6.4%		-6.4%	-5.9%
Kentucky	5.3%	5.8%	5.6%	-0.2%	0.3%
Michigan	5.8%	4.8%	4.8%	0.0%	-1.0%
Minnesota	3.6%	3.7%		-3.7%	-3.6%
Ohio	5.1%	5.0%	5.1%	0.1%	0.0%
Wisconsin	4.6%	4.6%	4.5%	-0.1%	-0.1%



Weekly Initial Claims – 14 weeks aggregate





Regular UI Claims – Reference Week (12th of the month) Input to LAUS Unemployment Rate Model Declines over the month - and over the year

Without earnings – Reference week claims

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	OTM Change	OTY Change
JANUARY	65,898	71,296	75,294	150,888	105,910	84,706	71,042	63,223	49,377	41,333	36,555	10,306	(4,778)
FEBRUARY	67,347	75,432	78,068	154,388	103,432	80,852	69,570	60,183	52,316	39,282	36,909	354	(2,373)
MARCH	59,716	64,936	74,759	157,257	93,469	71,696	60,752	54,578	45,928	35,755	32,069	(4,840)	(3,686)
APRIL	48,103	53,325	64,948	143,842	74,481	59,036	51,652	48,548	39,717	25,597			
MAY	46,779	46,002	55,480	141,174	66,779	54,680	46,328	42,997	32,460	22,807			
JUNE	45,533	46,350	57,228	136,670	67,996	55,021	46,820	41,722	29,524	22,030			
JULY	53,424	51,141	72,032	121,336	69,447	58,031	47,268	44,597	30,845	22,341			
AUGUST	45,021	43,887	61,985	103,509	62,976	51,710	42,134	39,998	26,061	21,472			
SEPTEMBER	41,247	42,500	61,548	92,680	58,280	46,824	41,955	39,563	23,685	20,941			
OCTOBER	42,487	42,313	67,306	86,275	58,317	46,909	39,467	37,778	23,768	19,917			
NOVEMBER	43,868	45,362	81,466	82,451	58,846	51,201	41,018	38,517	25,315	21,199			
DECEMBER	53,566	54,201	109,651	91,814	65,279	55,104	46,371	42,484	30,982	26,249			



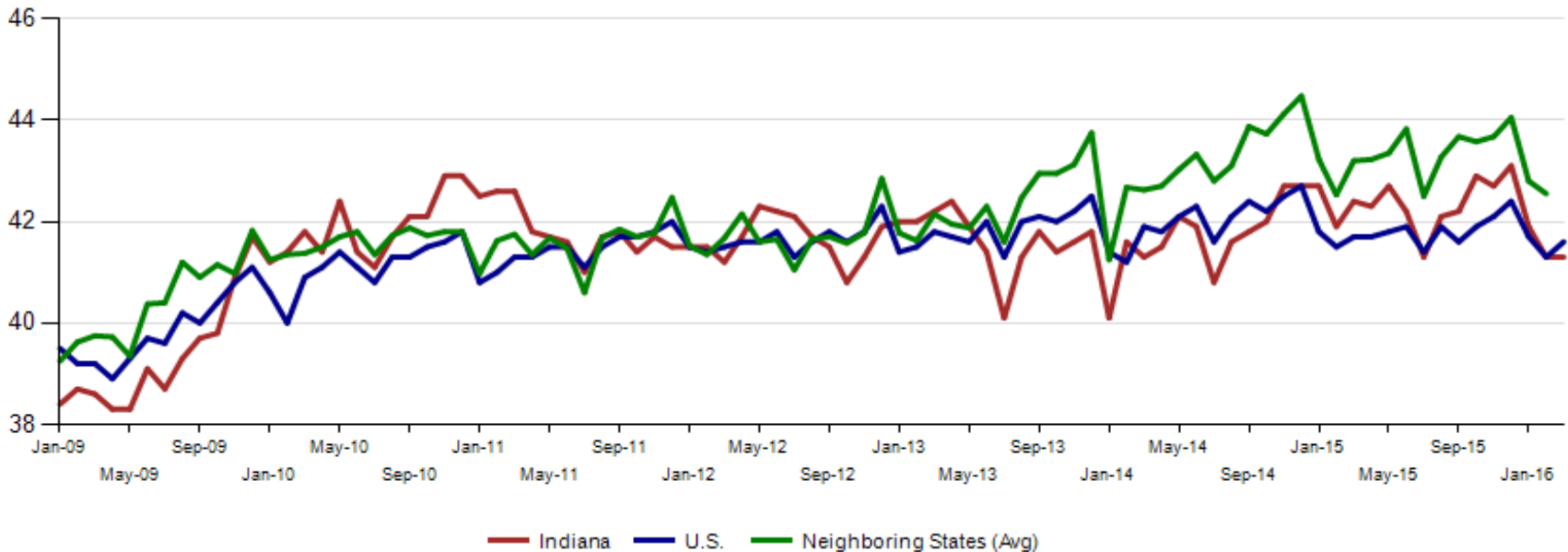
March growing Labor Force and private job loses make gap to new Benchmark Peak increase.

Supersector	Private Empl. Peak March 2000	Total Nonfarm Concentration	March 2016	New BMK	Total Nonfarm Concentration	Change Since Peak	Gap between LF Growth Since 2000
Private Educational & Health Services	330.1	11%	465.2	486.5	15%	127.4	-21.33
.....Private Educational Services	52.2	2%	72.3	75.6	2%	16.8	-3.31
.....Health Care & Social Assistance	277.9	9%	392.9	410.9	13%	110.6	-18.01
Manufacturing	671.1	22%	515.9	539.6	17%	-148.7	-23.65
Professional & Business Services	260.5	9%	320.7	335.4	10%	64	-14.70
Financial Activities	145.7	5%	131.3	137.3	4%	-15.8	-6.02
Construction	154.1	5%	130.3	136.3	4%	-31.2	-5.97
Leisure and Hospitality	267.2	9%	307.8	321.9	10%	39.3	-14.11
Trade, Transportation & Utilities	617.5	20%	591.8	618.9	19%	-16.9	-27.13
.....Trade	485.1	16%	450.6	471.3	15%	-36.1	-20.66
.....Transportation, Warehousing & Utilities	132.4	4%	141.2	147.7	5%	19.2	-6.47
All Other	166.4	6%	166.3	173.9	5%	1	-7.62
				0.0			
Total Private	2,612.6	87%	2,629.3	2749.8	86%	19.1	-120.53
Government (Includes Public Schools & Hospitals)	404.6	13%	429.2	448.9	14%	27.7	-19.68
Total Nonfarm	3,017.2		3,058.5	3,209.9		46.8	-151.40



Average weekly hours for Indiana manufacturing remained at 41.3 for the second month in a row. This is below the revised 43.3 in December 2015. Nationally, manufacturing weekly hours went up 0.3 to 41.3. July 2015 was the last time the National average weekly hours was higher than Indiana. For February 2016, Midwest neighboring states manufacturing workers averaged 42.6 hours per week.

Avg. Weekly Manufacturing Production Hours (non seasonally adjusted)





Institute For Supply Management: "The March PMI[®] registered 51.8 percent, an increase of 2.3 percentage points from the February reading of 49.5 percent. First time in six month Index has shown growth.

MANUFACTURING AT A GLANCE						
March 2016						
Index	Series Index Mar	Series Index Feb	Percentage Point Change	Direction	Rate of Change	Trend* (Months)
PMI[®]	51.8	49.5	+2.3	Growing	From Contracting	1
New Orders	58.3	51.5	+6.8	Growing	Faster	3
Production	55.3	52.8	+2.5	Growing	Faster	3
Employment	48.1	48.5	-0.4	Contracting	Faster	4
Supplier Deliveries	50.2	49.7	+0.5	Slower	From Faster	1
Inventories	47.0	45.0	+2.0	Contracting	Slower	9
Customers' Inventories	49.0	47.0	+2.0	Too Low	Slower	2
Prices	51.5	38.5	+13.0	Increasing	From Decreasing	1
Backlog of Orders	51.0	48.5	+2.5	Growing	From Contracting	1
Exports	52.0	46.5	+5.5	Growing	From Contracting	1
Imports	49.5	49.0	+0.5	Contracting	Slower	2
OVERALL ECONOMY				Growing	Faster	82
Manufacturing Sector				Growing	From Contracting	1

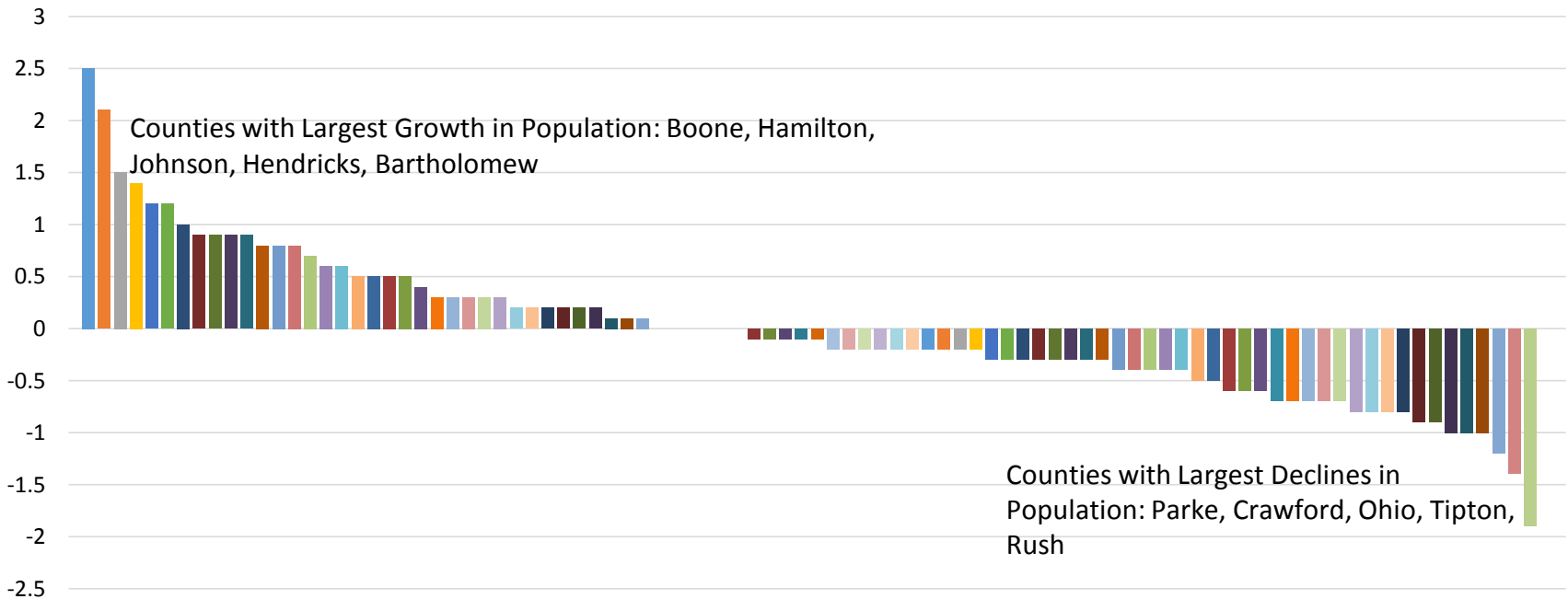
Manufacturing ISM[®] *Report On Business*[®] data is seasonally adjusted for the New Orders, Production, Employment and Supplier Deliveries Indexes.

*Number of months moving in current direction.



Indiana overall Population Change was 0.3%, with a total gain of 21,800 new residents (Gain-Loss). Estimates of Resident Population Change and Rankings: July 1, 2014 to July 1, 2015 Source: U.S. Census Bureau, Population Division Release Date: March 2016

Estimates of Resident Population Change and Rankings: July 1, 2014 to July 1, 2015 - State -- County / County Equivalent



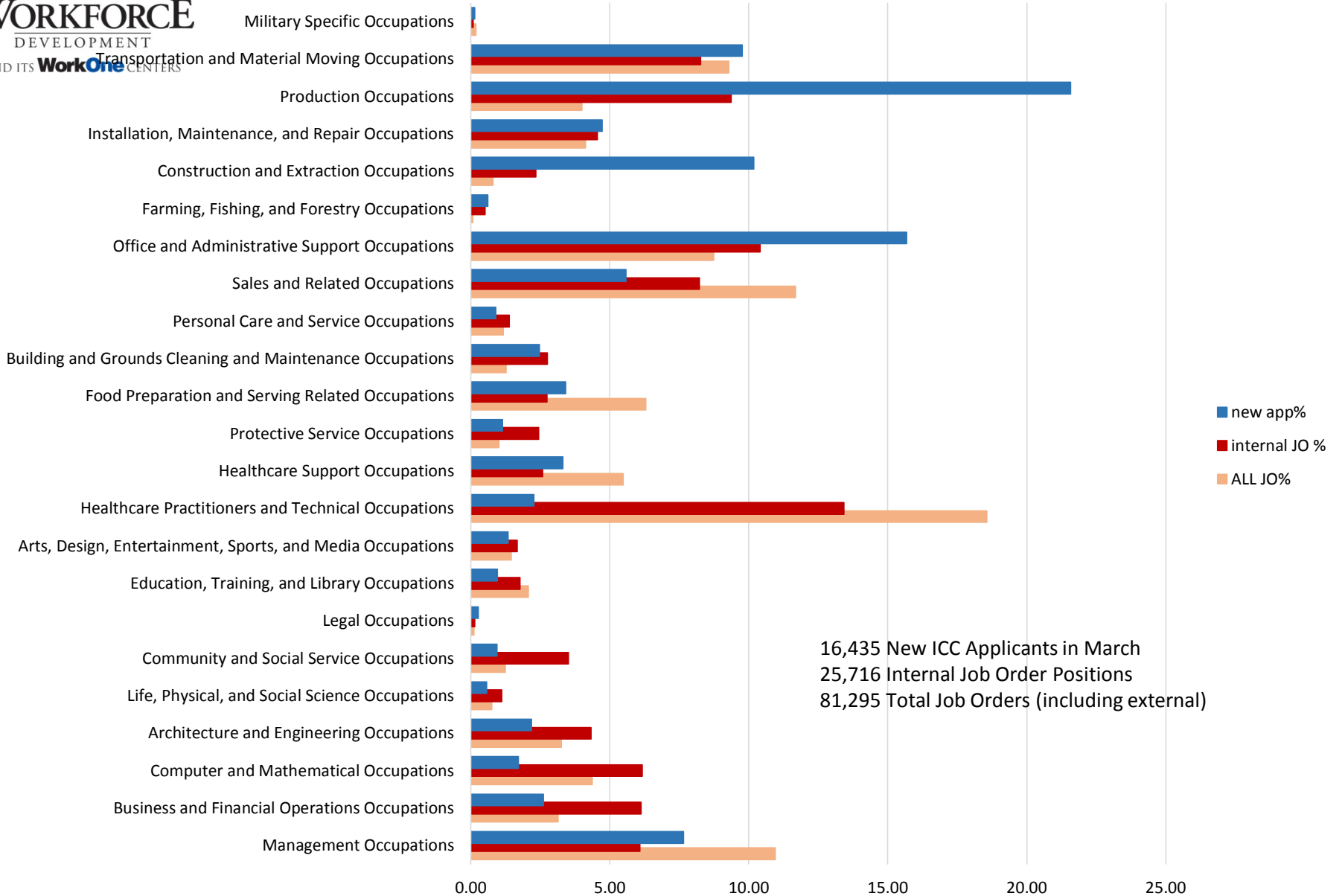


Internal Indiana Career Connect job orders are 63,144 in March. Health Care & Social Services had the most job orders followed by Retail Trade and Administrative & Support & Waste Management & Remediation Services. (this includes temp help services)

NAICS title	Mar-2016	Prior Year			Current Year			Change over Prior Year			Current Year Including External			Current Duration (days)
		January	February	March	January	February	March	January	February	March	January	February	March	March
Total		4,929	5,603	6,735	8,346	9,177	9,877	69%	64%	47%	53,676	56,847	63,144	51
Health Care and Social Services		1,090	1,117	1,460	1,893	1,832	2,113	74%	64%	45%	10,285	10,009	13,139	41
Retail Trade		350	290	387	701	694	865	100%	139%	124%	7,268	8,845	8,538	40
Admin. & Support & Waste Mgt. & Rem. Services		717	765	858	1,221	1,258	1,280	70%	64%	49%	7,535	7,940	8,066	49
Accommodation and Food Services		128	386	232	143	178	186	12%	-54%	-20%	2,735	3,935	5,221	61
Manufacturing		985	1,079	1,372	1,621	1,656	1,712	65%	53%	25%	4,166	4,427	4,423	53
Transportation & Warehousing		283	387	442	464	345	387	64%	-11%	-12%	4,113	3,474	3,532	64
Educational Services		154	117	150	98	848	612	-36%	625%	308%	2,191	3,409	3,441	34
Professional, Scientific, and Technical Services		283	274	416	615	733	778	117%	168%	87%	2,953	3,051	3,357	58
Finance and Insurance		177	239	306	254	209	223	44%	-13%	-27%	3,122	2,740	3,322	124
Wholesale Trade		159	192	195	330	342	371	108%	78%	90%	1,648	1,822	2,243	38
Information		79	122	199	219	229	299	177%	88%	50%	1,627	1,648	1,843	40
Public Administration		101	129	121	211	157	196	109%	22%	62%	1,570	1,470	1,694	69
Management of Companies and Enterprises		6	9	14	32	26	20	433%	189%	43%	1,234	993	1,254	74
Real Estate and Rental and Leasing		43	65	73	93	101	146	116%	55%	100%	812	692	956	53
Other Services(Except Public Administration)		113	165	148	151	163	238	34%	-1%	61%	1,381	1,208	916	84
Construction		144	137	208	155	207	214	8%	51%	3%	540	602	582	67
Utilities		48	44	67	93	80	127	94%	82%	90%	286	245	296	37
Arts, Entertainment, and Recreation		20	28	31	17	41	50	-15%	46%	61%	138	167	202	42
Agriculture, Forestry, Fishing and Hunting		26	32	29	21	34	40	-19%	6%	38%	41	78	67	70
Mining		14	6	10	3	34	12	-79%	467%	20%	20	82	44	29
Unallocated		9	20	17	11	10	8	22%	-50%	-53%	11	10	8	177



March 2016 ICC Applicant Concentration / Job Order Concentration



16,435 New ICC Applicants in March
25,716 Internal Job Order Positions
81,295 Total Job Orders (including external)